



METROPOLITAN
TRANSPORTATION
COMMISSION

Joseph P. Bort MetroCenter
101 Eighth Street
Oakland, CA 94607-4700
TEL 510.817.5700
TDD/TTY 510.817.5769
FAX 510.817.5848
E-MAIL info@mtc.ca.gov
WEB www.mtc.ca.gov

Memorandum

TO: TransLink® Management Group

DATE: April 24, 2009

FR: Ann Flemer, Deputy Executive Director, Operations

RE: TransLink® Contract Next Steps

While there will be several activities following the contract assignment, I want to bring the following two items to your attention for discussion at the TMG meeting.

a) Transition of Pre-paid Fare Media to TransLink®

One of the key objectives of the contract negotiations and the subsequent assignment to Cubic Transportation Systems is to directly address transit agency uncertainty about the program's future by securing a financially and technically viable contractor to deliver the program. Now that the assignment is near completion, the Commission is interested in turning attention toward transit agencies' plans to transition pre-paid fare media to TransLink® in order to take full advantage of the project investment to date, minimize the assurance payments to the contractor, and provide the long-awaited convenience to the customer. We are requesting that each agency that has already reached revenue ready status submit a fare media transition plan that describes the following:

1. The schedule and strategy to replace existing pre-paid fare media within two years or less of reaching the agency's revenue ready milestone:
 - AC Transit and Golden Gate Transit and Ferry should complete the transition by June 30th 2010;
 - SFMTA and Caltrain should complete the transition by September 30th 2010;
 - BART should complete the transition by May 2011, based on current forecasts of TransLink®'s reaching revenue ready status for BART.
 - VTA and SamTrans would submit plans at a later date, once TransLink approaches revenue ready status on those systems.
2. Known constraints that would limit the scope or schedule for a complete transition. For example, until the TransLink® Program defines a regional approach for distributing cards to youths, some agencies' may be unable to fully transition its youth pass customers.

MTC requests that transit agencies submit their transition plans to MTC by **July 31th**, with presentation to MTC's Operations Committee at the **September 11th** meeting. MTC has assigned members of the TransLink® project staff to be available to work with each transit agency in advance of the Committee presentations.

b) TransLink® Resource Allocation and Prioritization of Future Program Changes

In negotiating the contract assignment, MTC and Cubic needed to agree on a near-term resource allocation for the next 12-18 months. Included in this work plan are both ongoing initiatives, e.g. installation of TransLink® on BART, VTA and SamTrans, and the following key system upgrades to prepare for full scale market penetration:

Phase 2.3	Risk Mitigation	Phase 2.4 and Other Projects
1. Rework of installations on SFMTA vehicles	1. Device memory upgrade	1. VTA/SamTrans Revenue Ready
2. Completion of Phase 2.3 punchlist	2. Transition to contactless cards	2. West Dublin BART station integration
3. Phase 2.3 Conditional Acceptance	3. Employer program	3. SFMTA Metro TransLink®-only equipment deployment
4. Revised Data Store	4. Reports for performance monitoring and settlement	4. BART TVM integration
		5. AC Transit TransLink-only Transbay fare collection
		6. Additional devices on AC Transit buses
		7. SFMTA parking pilot
		8. VTA/regional pass accumulator

In order to deliver these projects on time, Cubic must fully allocate its resources to focus on these projects first. As these projects advance and eventually conclude, and subject to available resources, new projects can be added based on priorities determined by the TMG. MTC still needs to confer with Cubic on any remaining capacity they might have to take on new work.

To date, MTC and the transit agencies have not clearly established priorities for projects. The contract novation provides an excellent opportunity to improve this process going forward. MTC staff proposes to initiate a ranking process for future projects as follows:

- Compile a list of all known projects
- Identify criteria for evaluating the projects (See Attachment 1)
- Weight the criteria.
- Rank the projects against the criteria. (See Attachment 2 for initial results)

MTC presented an overview of this prioritization process and the initial results to the Design Review and Implementation Committee (DRAIC) and the TransLink® Finance Committee on April 22, 2009. Participants were clear in their interests in learning more about the criteria and process used by MTC and in working closely with MTC to confirm the prioritized list. Participants also made clear the importance of having a prioritization process as a way to control for the influence of individual agencies' advocating for agency-specific projects.

MTC will work closely with the committees both to refine the process and to reach consensus concerning the priorities. MTC also needs to work with the Contractor to more carefully determine its resource capacity to implement new projects. As conditions change, MTC and the transit agencies would revisit these priorities.

Attachment 1
Proposed Criteria for Evaluation and Prioritization of TransLink®-Related Projects

At the request of the TransLink® Strategic Business Planning Committee (SBPC), MTC developed evaluation criteria that incorporate elements of the draft vision and mission statements developed by the SBPC. The criteria are as follows.

1. Increases TransLink® transaction volume
2. Improves operating efficiencies for TransLink® and/or participating transit agencies
3. Improves seamlessness and/or convenience for customers
4. Incorporates emerging technologies and/or innovations
5. Efficiently uses financial and human resources by maximizing benefits relative to costs

Attachment 2

TransLink®-Related Projects to Be Included in Analysis of Program Priorities

MTC has developed an initial listing of projects for inclusion in the analysis of program priorities. The initial ranking of the projects is shown below. The scope of the list excludes projects already included in the near-term work plan agreed to by MTC and Cubic Transportation Systems, e.g. VTA Revenue Ready, and ongoing program management functions, e.g. system performance monitoring. The list also excludes projects that have little or no known impact on the TransLink® Contractor's resources, e.g. regional approach for distributing cards to youths.

Ranking	Title	Description
1.	TransLink® for BART Parking	Replacement of EZ Rider Parking Program with TransLink®-based system
2.	Add'l SFMTA Faregate Retrofits	Add CID3s to additional SFMTA exit faregates in order to allow additional throughput for TransLink® customers
3.	CID 1B Power Issue	Resolution of the CID1B failures that are apparently caused by power fluctuations
4.	In-Person Customer Service Facility	Establishment of in-person location(s) capable of providing TransLink® customer services, e.g. replacement of lost, stolen, and/or malfunctioning cards
5.	Improvements to AVM Screens	Improvements to user interface for Add Value Machines
6.	Phase III	Implementation of TransLink® on smaller transit agencies (County Connection, Vallejo Transit, Union City Transit, etc.)
7.	Chase Debit/TransLink® Card	Development of co-issued Chase debit/TransLink® card capable of functioning as both a TransLink® card and a bankcard
8.	Expansion to Marin Transit	Addition of Marin Transit as a separate agency; this is similar to Phase III, but there are some unique issues due to the relationship between Marin Transit and Golden Gate Transit
9.	Increase E-Cash Limit Above \$300	Increase in e-cash limit; particularly relevant due to recent increase in federal pre-tax transit benefit limit
10.	Senior/Disabled Fast Pass for BART	Enable use of senior/disabled Fast Pass on BART, which is consistent with recent agreement between BART and SFMTA
11.	AC Transit Pass Accumulator	Convert AC Transit 31-day passes to accumulator
12.	Caltrain/VTA TVM Integration	Integration of TransLink® functionality with agency-specific ticket vending machines
13.	AC Transit Youth Pass Exception Report	Implementation of report to support AC Transit proposal for limiting access to AC Transit youth 31-day pass
14.	On Board Integration	Integration of TransLink® hardware and functionality with other on-board equipment, e.g. AVL systems, radios, fareboxes, etc.

Ranking	Title	Description
15.	Redesign of TransLink® Reports	Improvements to TransLink® reports based on experiences to date
16.	Improved Management of Hotlisted Cards	Improves fraud prevention by detecting when a hotlisted card is due to expire from the hotlist after one year and re-hotlisting those cards if they are used
17.	TOT Improvements (Encryption & Senior/Youth Checks)	Enhancement to improve data security and fraud prevention
18.	Golden Gate Ferry Faregate and TVM Integration	Integration of TransLink® functionality with agency-specific faregates
19.	Read/Write HCR	Development of modified HCR3 capable of deducting fares; originally proposed to support use of TransLink® on SFMTA cable cars
20.	HCR3 Change Requested by Caltrain	Simplified user interface for quick recognition of fare validity
21.	BART-Specific Data Store Issue	Enables communication between new Data Store and BART's DAS
22.	Escrow Auto Build Environment	Enables expeditious testing of software in escrow environment